USDA Weekly Retail Turkey Feature Activity

Fri. Jul 27, 2012

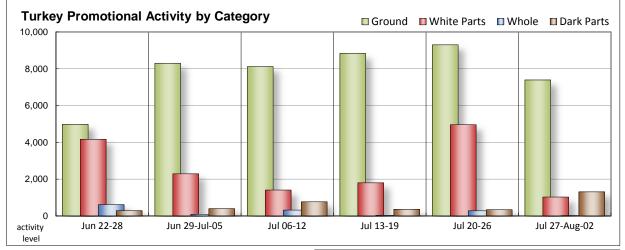
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/27 thru 08/02.

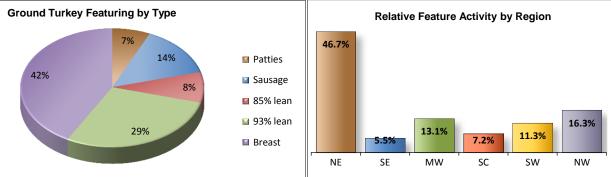
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted,												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST	YEAR						
Feature Rate 1/		of 22,500		of 22,500	43.2% of 19,500 outlets							
		tlets		tlets								
Special Rate 4/		4%		0%		3%						
Activity Index 2/		,220		,910		,490						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:	40	4.40	70	4.70								
Fresh - Hens	10	_	70	_								
- 101115	10	1.48	10									
Frozen - Hens			100									
" - Toms PARTS:			100	1.00								
Breast:												
Bone-in, whole Fresh	40	2.79	20	2.56	70	2.44						
Frozen	310	-	2,240		1,520							
Split, bone-in	310	1.79	2,240	1.17	1,520	1.00						
Fresh	50	2.94	160	2.99	10	2.98						
Rotisserie	10		350		220							
Boneless, whole	10	0.00	630		80	_						
Cutlets	310	4.36	940		610							
Cutlets, thin sliced	10		10		010	3.23						
·			10	4.99								
Strips	100		040	4.00	70	4.50						
Tenders	200		610		70							
Marinated Tenders	1,030		620		1,620							
Drumsticks	420	_	150	-	190							
Thighs	170		110		50	-						
Wings	350		50		180	1.79						
Necks	160		10		20	4.00						
Smoked Drumsticks	40		10		30							
Smoked Wings Smoked Necks	110 60		10	2.10	30	1.99						
GROUND TURKEY:	7,390		9,300	3.10	9,850	3.01						
Patties	500		910		1,540							
Sausage	1,040		1,190		1,860							
85% lean	620		710		1,450							
93% lean	2,130		5,970		3,980							
Breast	3,100		520		1,020							
Rolls (frsh/frz 1 lb.)	270		40		650							
Specialty 5/	2.0	1.00	10		000	2.00						
Patties	60	4.43	300	4.07	30	4.32						
93-94% lean	80		560		50							
Breast	30		510		230							
Notes rolls 9 anasislas no												

This Week's Turkey Feature Highlights This week, retail feature activity decreases on turkey and deli items. Whole turkey offers virtually drop from view. Bone-in breasts appear less

often with pricing at higher levels. Rotisserie breast offerings wane with prices considerably higher. Marinated tender offerings and prices increase. The balance of white parts decrease in circular visibility. Both fresh and smoked dark parts are more active this week. Price values are steady to higher. Ground turkey activity lessens, but there are still plenty of opportunities to grill; pricing is higher. Ground breast meat offerings lead the grinds with 93% lean a distant second. Deli activity is slightly lower and provides a great alternative to beat the summer heat. Retailers offer self-service and thick slicing chicken deli meat more often. Processor brands are most promoted. Turkey deli prices for both processor and private label whole muscle, thin slicing, and shaving meats are lower, while chicken whole muscle deli are higher.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

Note: rolls & specialty not included in ground turkey total and weighted average.



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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/27 thru 08/02.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.		SOL	ITHEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 29.1% of 4,000 sampled outlets 6.5% of stores w/ no-price promotions				
	(CT,DE,MA,MD,M	IE,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,I	MS,NC,SC,TN,VA,V	VV)					
Feature Rate 1/		0 sampled outle	. ,		,000 sampled outle	,					
Special Rate 4/	1.3% of stores w	•			w/ no-price prome						
Activity Index ^{2/}		Index = 6,200			/ity Index = 990			Index = 1,580	01.01.0		
Activity illucx	Price Range	Summar	V	Price Range	Summa	rv	Price Range	Summa	rv		
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens							1.48	10	1.48		
" - Toms							1.48	10	1.48		
Frozen - Hens											
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.69	10	1.69	1.59	10	1.59	1.69 - 1.79	170	1.78		
Split, bone-in											
Fresh	2.79 - 2.99	50	2.94								
Rotisserie	8.99	10	8.99								
Boneless, whole											
Cutlets	3.99 - 5.99	270	4.42	3.99	40	3.99					
Cutlets, thin sliced	5.99	10	5.99								
Strips	4.99	100	4.99								
Tenders	3.99	160	3.99	3.99	40	3.99					
Marinated Tenders	3.73 - 5.33	870	4.34	4.26	70	4.26	3.73	10	3.73		
Drumsticks	1.89 - 1.99	310	1.94				1.69 - 1.79	100	1.70		
Thighs	1.99	170	1.99								
Wings	0.99 - 1.99	320	1.91				1.79	10	1.79		
Necks	1.79	140	1.79				1.79	10	1.79		
Smoked Drumsticks				1.99	40	1.99					
Smoked Wings	1.69	70	1.69	1.99	40	1.99					
Smoked Necks	1.99	20	1.99	1.99	40	1.99					
GROUND TURKEY:											
Patties	2.99 - 3.99	490	3.56			_	3.69	10	3.69		
Sausage	3.19 - 3.99	540	3.70	3.27 - 3.59	80	3.34	2.99 - 3.57	370	3.40		
85% lean	1.92 - 2.67	170	2.49	2.08 - 2.67	310	2.41	2.45 - 2.50	20	2.48		
93% lean	2.84 - 3.69	690	3.28	2.99 - 3.19	160	3.12	2.49 - 3.49	620	2.93		
Breast (99-100% lean)	3.76 - 5.38	1,570	4.72	3.84 - 4.61	110	4.30	3.99 - 4.47	90	4.06		
Rolls (frsh/frz 1 lb.)	1.79 - 2.00	80	1.93	1.79 - 2.00	50	1.87	1.79 - 1.99	130	1.98		
Specialty ^{5/}	0.00 5.00	40	4.07				2.22	22	0.00		
Patties	3.99 - 5.99	40	4.97				3.33	20	3.33		
93-94% lean	3.99 - 4.49	80	4.15 5.00								
Breast	5.99	30	5.99								





(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

		ENTRAL U.S.				WEST U.S.			NORTHWEST U.S.					
	(AR,AZ,CO,KS,L		,HI,NV)		(AK,ID,MT,OR,WA,WY)									
Feature Rate 1/	ture Rate 1/ 19.1% of 4,000 sampled outlets				34.9% of 2,900 sampled outlets					59.6% of 1,200 sampled outlets				
Special Rate 4/	0.0% of stores w/	0.0% of	no-price pro	motions	0.0%	0.0% of stores w/ no-price promotions								
Activity Index 2/	Activity	Activity Index = 990					Activity	Index = 590						
	Price Range	Price Range Summary				Price	Range	Sumn	nary					
	(\$/pound)	Stores V	Vtd Avg	(\$/poun	d)	Stores	Wtd Avg	(\$/pd	ound)	Stores	Wtd Avg			
WHOLE BIRDS:														
Fresh - Hens														
" - Toms														
Frozen - Hens														
" - Toms														
PARTS:														
Breast:														
Bone-in, whole														
Fresh									2.79	40	2.79			
Frozen	1.48 - 1.99	120	1.81											
Split, bone-in														
Fresh														
Rotisserie														
Boneless, whole														
Cutlets														
Cutlets, thin sliced														
Strips														
Tenders	0.00	00	0.00					0.00	4.00	50	4 47			
Marinated Tenders	3.99	30	3.99					3.99	- 4.66	50	4.47			
Drumsticks	1.19	10	1.19											
Thighs														
Wings	0.99 - 1.19	20	1.10											
Necks	0.99	10	0.99											
Smoked Drumsticks														
Smoked Wings														
Smoked Necks														
GROUND TURKEY:														
Patties														
Sausage	2.95	20	2.95						3.27	30	3.27			
85% lean	2.08 - 2.39	70	2.18		.40	40	2.40		2.33	10	2.33			
93% lean	2.79 - 3.19	220	3.13	2.80 - 3		370	3.00		- 3.19	70	3.07			
Breast (99-100% lean)	4.79	360	4.79	3.99 - 5	.19	580	4.05	3.99	- 4.79	390	4.15			
Rolls (frsh/frz 1 lb.)	1.00	10	1.00											
Specialty ^{5/}					T									
Patties														
93-94% lean														
Breast														



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Jul 27, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/27 thru 08/02.

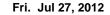
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY				NORTHEAST U.S.		SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)			,WV)	
Factoria Bata 1/	77.8% o	f 22,500	66.6% o	f 22,500	80.0% o	f 19,500									
Feature Rate 1/	sto	res	sto	res	sto	res		94.3% of 4,400 sampled outlets			82.5% of 6,000 sampled outlets			tlets	
Activity Index 2/	45	700	46,	040	45	570		Activity Index = 12,190			Activity Index = 12,090				
Activity index 2/	45,	700	40,	040	43,	370		Price Range Summary		Price	Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		(\$/pc	ound)	Stores	Wtd Avg	(\$/pc	ound)	Stores	Wtd Avg
SERVICE DELI - Turkey															
Category 1															
Processor Brand	5,540	7.92	4,550	8.11	5,350	7.68		6.99		2,570	7.92	6.99	- 10.49	2,070	7.96
Private Brand	1,860	7.83	3,680	7.37	1,360	7.18		7.49	- 8.99	980	8.04		6.99	440	6.99
Category 2															
Processor Brand	5,280	6.05	4,740	6.43	5,260	6.08		4.88 -		1,630	5.92	4.88 -	7.29	660	5.77
Private Brand	1,380	6.46	3,830	6.36	4,090	6.67		4.99 -	7.99	510	6.40				
Category 3	000	0.00	4.070	4.05	770	4.04		0.00	4.00	000	4.00		5.00	50	5.00
Processor Brand	830	3.86	1,870	4.05	770	4.01		2.98 -		200	4.09		5.99	50	5.99
Private Brand	40	4.98	2,690	5.19	60	4.62			4.98	40	4.98				
Turkey Ham Processor Brand	380	3.50	490	3.50	510	3.17		2.98 -	4.99	210	4.22				
Private Brand	300	3.50	110	3.99	180	3.17		2.90 -	4.33	210	4.22				
Turkey Pastrami			110	5.55	100	3.99									
Processor Brand	350	3.97	350	3.85	200	4.07		3.49 -	2.00	310	3.98				
Private Brand	120	4.99	330	3.00	200	4.07		3.49 -	3.99	310	3.90				
-	120	4.99								1					
SERVICE DELI - Chicken															
Category 1	0.400	7.00	0.000	7.00	4.040	7.00		F 00	0.00	4 000	7 77	4.00	0.00	700	0.00
Processor Brand	3,120	7.62	3,020 790	7.32	4,240	7.62		5.99		1,280	7.77	4.99	- 8.99	790 40	8.08
Private Brand Category 2	3,070	7.39	790	7.02	840	6.82			6.99	210	6.99		6.99	40	6.99
Processor Brand	120	4.16	360	5.70	310	6.41			5.98	10	5.98				
Private Brand	410	6.56	260	5.75	310	0.41		4.98 -		250	6.93				
SELF-SERVICE DELI	410	0.30	200	5.15				4.90 -	0.99	250	0.93				
(dollars per tub or pouch)															
Turkey 7-10 oz															
Processor Brand	7.460	2.90	7,260	3.20	9,440	3.29		2.50 -	3.99	1,000	3.40	1 98 -	3.79	2,160	2.84
Private Brand	4,030	2.75	1,890	3.03	2,030	2.98		2.33 -		970	2.54		3.33	1,860	3.05
Turkey 16 oz	.,000	20	.,000	0.00	_,000	2.00			5.55	0.0		2.00	0.00	1,000	5.55
Processor Brand	670	5.42	1,920	5.05	430	5.48		4.99 -	5.49	100	5.16	4.99 -	5.99	120	5.06
Private Brand			,- ,-								-		-		
Chicken 7-10 oz															
Processor Brand	7,040	2.90	6,340	3.14	8,520	3.30		2.50 -	3.99	950	3.42	1.98 -	3.79	2,070	2.85
Private Brand	4,000	2.75	1,890	3.03	1,980	2.97	L	2.33 -	3.00	970	2.54	2.33 -	3.33	1,830	3.06

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/27 thru 08/02.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	H,NV)	(AK,ID,MT,	OR,WA,WY)		
Feature Rate 1/	79.09/ of 4.000	sampled outlets	69 09/ of 4 000	sampled outlets	60.0% of 2.000 c	sampled outlets	62.8% of 1,200 sampled outlets			
		rdex = 9,410	· ·	rdex = 6,320		dex = 3,940	•	-		
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Activity Index = 1,750 Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(4.1)	J	(11)	J	(4.1)	J	(4.1)	<u> </u>		
Category 1										
Processor Brand	6.58 - 10.49	560 7.68	6.99 - 10.49	80 8.54	7.99 - 8.99	260 8.04				
Private Brand	6.99 - 9.99	170 8.36	6.99 - 8.49	150 7.36	8.99	120 8.99				
Category 2										
Processor Brand	4.98 - 7.99	1,820 6.45	4.99 - 6.98	950 5.89	4.99 - 5.99	210 5.20	5.99	10 5.99		
Private Brand	4.98 - 7.49	550 6.42	5.99	120 5.99			6.99	200 6.99		
Category 3	0.40	000 0.57	0.40	470 0.57		100 0.55	4.00	40 400		
Processor Brand	2.49 - 3.99	300 3.57	2.49 - 4.49	170 3.57	2.99 - 3.99	100 3.55	4.99	10 4.99		
Private Brand										
Turkey Ham Processor Brand	2.49 - 4.49	60 3.73	1.99	110 1.99						
Private Brand	2.43 - 4.43	00 3.73	1.99	110 1.99						
Turkey Pastrami										
Processor Brand	3.49	10 3.49	2.79 - 4.99	30 4.08						
Private Brand	0.10	10 0.10	2.70 1.00	120 4.99						
SERVICE DELI - Chicken				120 4.00						
Category 1										
Processor Brand	4.99 - 8.99	600 6.85	5.99 - 6.99	190 6.67	7.99 - 8.49	260 8.02				
Private Brand	6.99 - 7.99	310 7.05	6.99 - 7.99	750 7.02	6.99 - 7.99	1,110 7.50	6.99 - 7.99	650 7.96		
Category 2						1,110				
Processor Brand	3.99	110 3.99								
Private Brand	5.99	160 5.99								
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	1.99 - 3.99	1,700 2.66	2.33 - 3.49	1,600 2.78	2.33 - 3.50	670 3.04	2.18 - 3.50	330 3.22		
Private Brand	2.33 - 3.29	520 2.46	2.33 - 3.00	300 2.44	2.33	270 2.33	2.33 - 3.00	110 2.56		
Turkey 16 oz										
Processor Brand	4.98 - 5.99	350 5.57	4.77 - 5.99	100 5.61						
Private Brand										
Chicken 7-10 oz Processor Brand	1.99 - 3.99	1 670 2 65	2.33 - 3.49	1,350 2.76	2.33 - 3.50	670 3.04	2.18 - 3.50	330 3.22		
Processor Brand Private Brand	2.33 - 3.29	1,670 2.65 520 2.46	2.33 - 3.49	1,350 2.76 300 2.44	2.33 - 3.50	270 2.33	2.33 - 3.00	110 2.56		
1 IIVate Dialiu	2.00 - 0.20	J20 2.40	2.00 - 0.00	JUU 2.77	2.00	210 2.00	2.00 - 0.00	110 2.00		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)